

CIMA Benevolent Fund

Privacy Policy

Effective 26 March 2018

Overview

The Chartered Institute of Management Accountants (CIMA) Benevolent Fund is there to support CIMA members and their families through periods of hardship. Even for qualified CIMA members, difficulties can arise for reasons outside their control, such as serious illness, family problems or a prolonged period out of work.

This Privacy Policy describes the ways in which the Personal Data you provide to the CIMA Benevolent Fund is collected and processed by CIMA, the CIMA Benevolent Fund and the Association of International Certified Professional Accountants (collectively referred to herein as “the controllers”, “we”, “us”, “our”). By providing your Personal Data to any of the controllers, you acknowledge and agree that your data may be shared between and/or processed by any of the controllers.

It is your responsibility to review and understand this Privacy Policy prior to providing your Personal Data to us. If you do not accept and agree to the Privacy Policy, please refrain from providing your Personal Data to us.

Collection of Personal Data

In order to provide Benevolent Fund assistance and for the other purposes set out in **Use of Information** below, we collect and process Personal Data from Benevolent Fund applicants. We may collect information from you such as, but not limited to, your name, email address, mailing address, phone/fax numbers, date of birth, marital status, CIMA membership information, employment information, personal financial information, and other information relevant to your Benevolent Fund application, such as information related to your health or family circumstances (“**Personal Data**”). Some of the Personal Data which we collect, such as information related to your health, may be sensitive in nature. We may also collect Personal Data from you related to your partner and other family members in order to evaluate your eligibility for Benevolent Fund assistance. It is your responsibility to ensure you have obtained appropriate consent from these individuals before disclosing their Personal Data to us. You are not required to provide us with all of the Personal Data listed above, but if you do not do so, we may not be able to effectively process your application for Benevolent Fund assistance.

From time to time and as permitted by applicable law(s), we may collect Personal Data about you and update any existing Personal Data that we currently hold from other third-party sources, including publicly available data sources, publicly available social networking sites such as LinkedIn, or your employer or university/school.

See **Use of Information** section below for details regarding the ways that we use and process your Personal Data.

Use of Information

Your Personal Data may be used in the following ways:

- To determine eligibility for Benevolent Fund assistance
- To provide Benevolent Fund assistance to you (including payments and other resources)

- To communicate with you regarding your application status and provide information related to available resources and assistance
- To coordinate with other charities and organisations who may be able to provide you with assistance
- To respond to your requests and inquiries
- Internal purposes, such as system administration, internal audits and internal research
- To request your participation in surveys, focus groups, or other initiatives which help us to gather information used to develop and enhance the program
- To comply with applicable law(s) (for example, to comply with a search warrant, subpoena or court order)

We will process your Personal Data for the purposes identified above on the following bases:

1. Your explicit consent;
2. Our legitimate interests;
3. As necessary to comply with our legal obligations, resolve disputes and enforce our contractual agreements.

We will retain your Personal Data for the duration of the period in which we review your Benevolent Fund application and/or provide assistance to you, as well as for an additional period afterwards, to cover any outstanding issues or queries that may arise (typically 4 years). Please note that this period of retention is based on our internal data retention policy and is subject to our review and alteration.

Sharing and Disclosure to Third Parties

We may disclose your Personal Data to third parties from time to time under the following circumstances:

1. You request or authorize the disclosure of your personal details to a third party.
2. The information is disclosed as permitted by applicable law(s) and/or in order to comply with applicable law(s) (for example, to comply with a search warrant, subpoena or court order).
3. The information is provided to our agents and volunteers and other, vendors or service providers who perform functions on our behalf. See below for additional details.

It is likely that the identity and categories of such third parties will change during the life of your account but, depending on your specific situation, your Personal Data may be disclosed to the following categories of third-party service providers who perform functions on our behalf. We require that our third-party service providers only use your Personal Data as necessary to provide the requested services to us and each service provider is subject to a set of terms consistent with this Privacy Policy.

- Our volunteers or committee members who perform various functions on our behalf
- Hosting providers for the secure storage and transmission of your data
- Legal and compliance consultants, such as external counsel, external auditors, or tax consultants
- Payment solution providers for the secure processing of payments made to or from you
- Technology providers who assist in the development and management of our web properties

Transfer of Personal Data internationally

By providing us with your Personal Data, you acknowledge and agree that we may from time to time transfer any of your Personal Data to any of our offices or to the offices of any of our affiliates,

agents or appointed representatives located around the world. We have implemented appropriate safeguards for transfers of personal information originating from the European Economic Area (EEA) to countries located outside of the EEA. These safeguards include implementing standard data protection clauses which have been approved by the European Commission or (in relation to transfers from the European Union to the USA) transferring Personal Data to entities who have signed up to the EU-U.S. [Privacy Shield](#). Please do not submit any Personal Data to us if you do not wish for your data to be transferred internationally.

Security and Other

We use reasonable measures to strive to safeguard and secure the Personal Data we collect. Any transmission of personal information is at your own risk. Technology, such as, but not limited to, Transport Layer Security (TLS) and Secured Socket Layer (SSL), is used to enhance security and reduce risk of loss. Our security practices, processes or technology do not guarantee absolute security of your information and you should take all normal personal precautions such as, but not limited to, not sharing passwords, closing browsers, and not using public networks (e.g., internet cafes, etc.).

Subject Access/User Rights

As a user, you are subject to the following rights:

- The right to be informed of the use of your Personal Data
- The right to access and/or to require the correction or erasure of your Personal Data
- The right to block and/or object to the processing of your Personal Data
- The right to not be subject to any decision based solely on automated processing of your Personal Data
- In limited circumstances, you may have the right to receive Personal Data in a format which may be transmitted to another entity.
- If you have a complaint in relation to the processing of your data carried out under this Privacy Policy, you have the right to lodge a complaint with your local supervisory authority. If you are located in the European Union, you can find the details of your local supervisory authority [here](#).

You may seek to exercise any of these rights by updating your information online (where possible) or by sending a written request to our Data Protection Officer using the contact details listed below:

Jonathan Mabe, Data Protection Officer
220 Leigh Farm Rd.
Durham, North Carolina 27707
SecurityandPrivacyOffice@aicpa-cima.com

Contact Information

You are encouraged to report any improvements, suggestions, or any suspected breaches of privacy or security to us by using the contact information listed below.

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